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INTERIOR DESIGN

NOVEMBER 1978

IBD/INTERIOR DESIGN COMPETITION WINNERS

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TILE EXHIBITIONS BY ROGER FERRI AND JOHN SALADINO

A CAHNERS PUBLICATION

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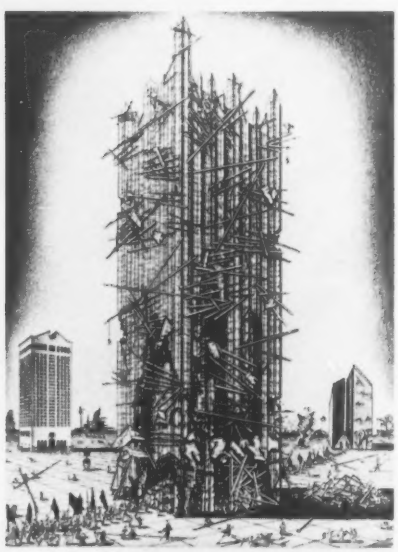

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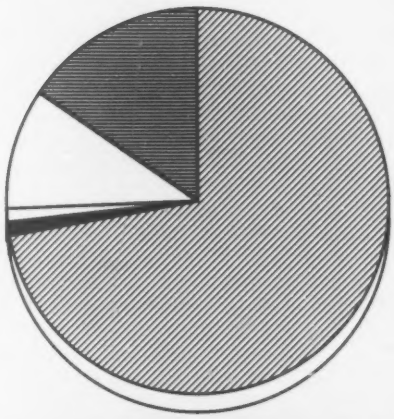

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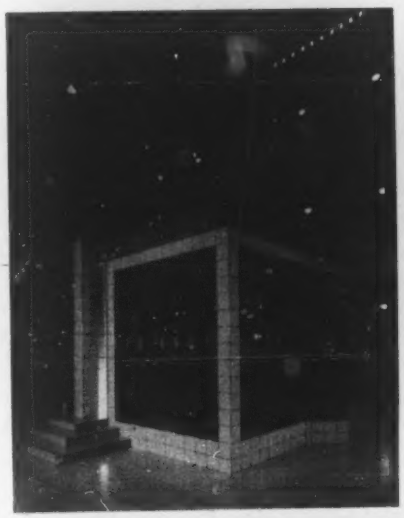

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Our Universe

How many interior designers and design firms are really out there? How do they operate, what do they specify? After years of guesswork, a new study sponsored by* Interior Design *magazine gives the answers.

Over the last six months a groundbreaking survey of the profession has been under way. Conducted by the respected firm of Yankelovich Clancy Shulman for *Interior Design* magazine, it was undertaken in two phases. The first, last spring, determined the size and composition of the whole universe of interior designers. The second, recently completed, obtained a more detailed perspective on professional activities. The first contacted more than 1,700 firms for brief telephone interviews; the second singled out nearly 500 designers for personal interviews averaging an hour each. The result is a body of information about the whole profession—residential as well as contract fields—that has never before been substantiated. We present highlights here for the interest and use of our readers.

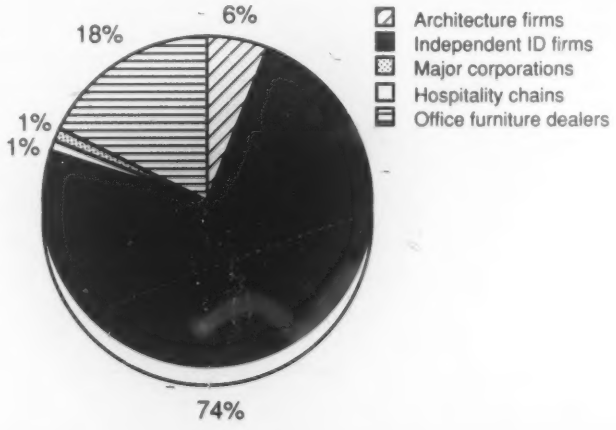
Universe Size

The first aim of the study was to determine how many U.S. firms employ at least one interior designer selecting, specifying, recommending or purchasing products for interior design projects. For some types of firms, there were also other criteria to preclude "double counting." Of more than 54,000* firms considered it was determined that slightly less than half qualified for inclusion—that is they have at least one interior designer on staff.

The 26,045 that did qualify were distributed very unevenly among the five company types into which they were subdivided, with almost three-fourths of them being independent interior design firms. The breakdown was:

Percentage of firms qualifying

	Number of firms listed	Number of firms qualified	Percentage of firms qualified
Architecture firms	2,292	1,670	6
Independent interior design firms	35,473	19,160	74
Major corporations	750	250	1
Hospitality chains	270	165	1
Office furniture dealers	15,595	4,800	18
Totals	54,380	26,045	100



* *Independent interior design firms and office furniture dealers were obtained from all yellow pages in the continental U.S.; architecture firms were obtained from the AIA list of firms that have an interior designer on staff; major corporations contacted were the Fortune 500 industrial companies and 250 service companies; chain hospitality firms were generated from the* Restaurants & Institutions *list–excluding governmental and military listings.*

Value of Products Specified

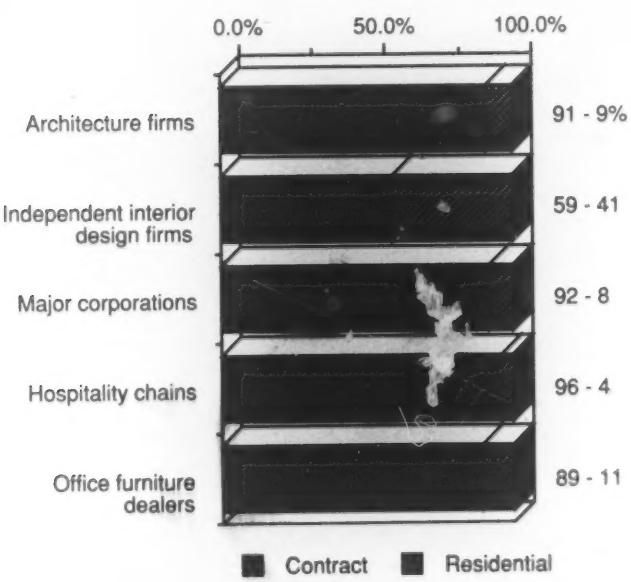
To establish the total value per year of specified interior design products, an average was established for each of the five firm types, and this was multiplied by the total number of qualifying companies. These averages varied widely, with chain hospitality firms, although few in number, specifying an average of nearly $6 million each, and with independent interior design firms, at the other end of the scale, specifying less than $1 million each. In arriving at the $1.7 million average for office furniture dealers, care was taken to include only merchandise specifications originated by the dealers themselves. The total picture is:

Value of products specified

	Number of firms	Average ($ millions)	Total ($ millions)	Share of market (%)
Architecture firms	1,670	3.52	5,880	19
Independent interior design firms	19,160	.79	15,135	49
Major corporations	250	3.06	765	3
Hospitality chains	165	5.97	985	3
Office furniture dealers	4,800	1.69	8,065	26
Totals	26,045	1.19 (average)	30,830	100

Job Mix

We were also interested in learning the proportion of contract and residential products specified/purchased by each firm type in terms of total dollar volume.



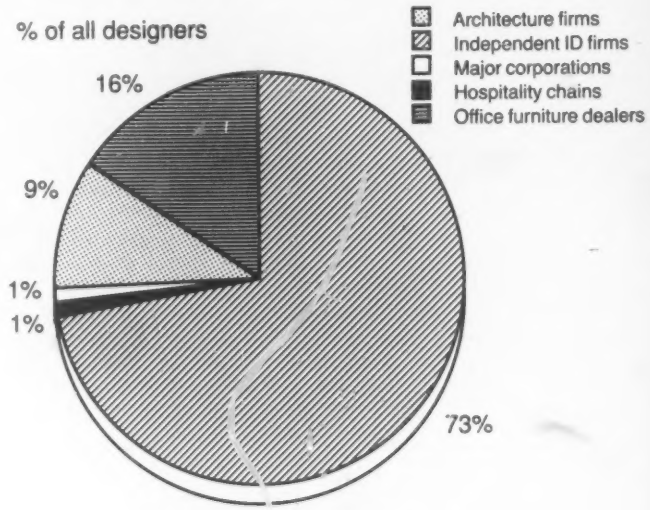
As for the dollar volume specified in each category, the study produced these results:

Dollar volume specified

	Total volume ($ million)	Contract volume ($ million)	Residential volume ($ million)
Architecture firms	5,880	5,290	590
Independent interior design firms	15,135	8,930	6,205
Major corporations	765	705	60
Hospitality chains	985	945	40
Office furniture dealers	8,065	7,180	885
Totals	30,830	23,050	7,780

Designer Population

Other questions often asked are how many interior designers there are and how they are distributed. Our study shows a total of 75,300 interior designers employed by all the qualified firms, distributed as follows:



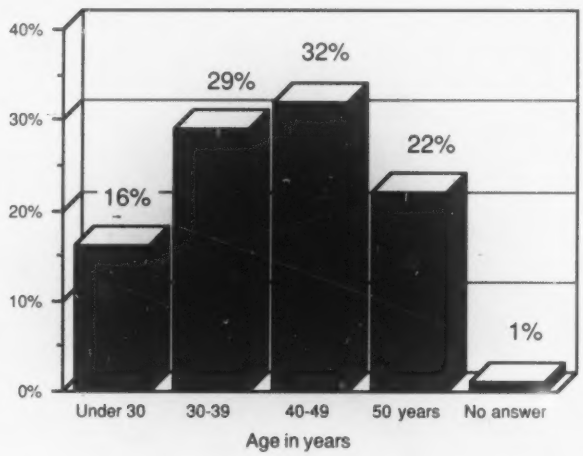
Designer population

	Average number designers per firm	Total designers	% of all designers
Architecture firms	4.20	7,000	9
Independent interior design firms	2.86	54,800	73
Major corporations	4.20	1,050	1
Hospitality chains	3.89	650	1
Office furniture dealers	2.44	11,800	16
Totals	2.89 (average)	75,300	100

Designer Profile

For the remaining survey questions, dependent on hour-long in-person discussions with designers, the Yankelovich team worked with a random sample of designers who work for firms that specify $200,000 or more per year in design products. In an effort to contact the most knowledgeable designers, senior-level designers were interviewed. The 17,780 firms represented closely resembled the larger group surveyed last spring in matters of firm type, job mix, etc.

One area of study was age. The total from all types of firms had this profile:

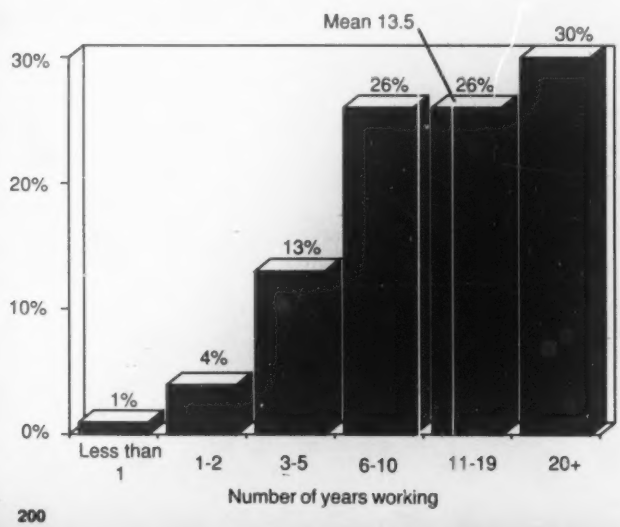


As to sex, the makeup of our profession is split almost exactly in half, 52 percent of practicing interior designers being women, 48 percent men.

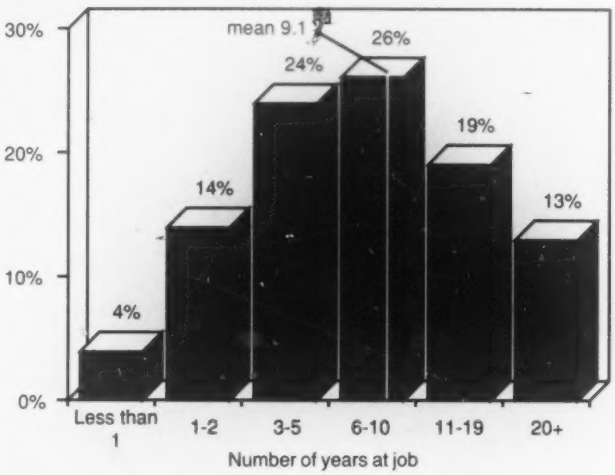
Their educational qualifications are impressive, 69 percent of them being college graduates and 27 percent earning at least some graduate school credits. The most commonly earned degree was in interior design (40 percent), followed by degrees in fine arts (19 percent), liberal arts (18 percent), business administration (11 percent) and architecture (8 percent).

Career Length

How long have these designers been at work in their profession? Here are the percentages:



Giving us a mean working career of 13.5 years. And how frequently do these designers change jobs? To suggest the answer, we surveyed the length of time they have been with their present firms. In this case, the mean employment time was 9.1 years, and the breakdown was as follows:

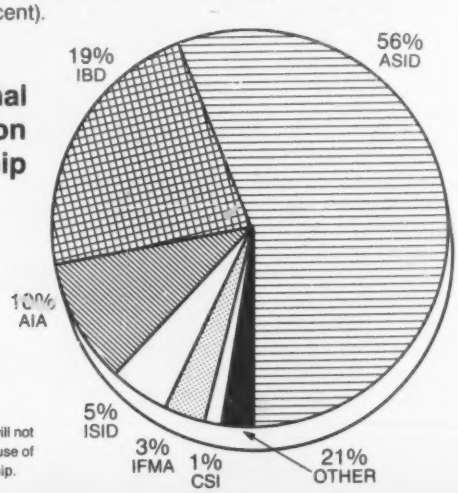


Membership

Half the designers (49 percent) were found to belong to a professional organization, with membership rates being highest (74 percent) in architectural firms. Among those who do belong to one or more organizations, only half (56 percent) belong to the American Society of Interior Designers (ASID), by far the leading organization represented, according to membership. About a fifth (19 percent) belong to the Institute of Business Designers (IBD), and half that number (10 percent) to the American Institute of Architects (AIA). Among designers who are with independent interior design firms, the strength of ASID membership was even greater (61 percent), and, as might be expected, AIA membership soared (to 48 percent) among designers working for architecture firms.

Among organizations with smaller memberships were the International Society of Interior Designers (5 percent), the International Facility Management Association (3 percent), and the Contruction Specifications Institute (1 percent).

Professional organization membership



NOTE: Percentages will not add up to 100% because of overlap in membership.

For the first time ever, a comprehensive survey of the whole profession, residential designers as well as contract ...

Trends Seen

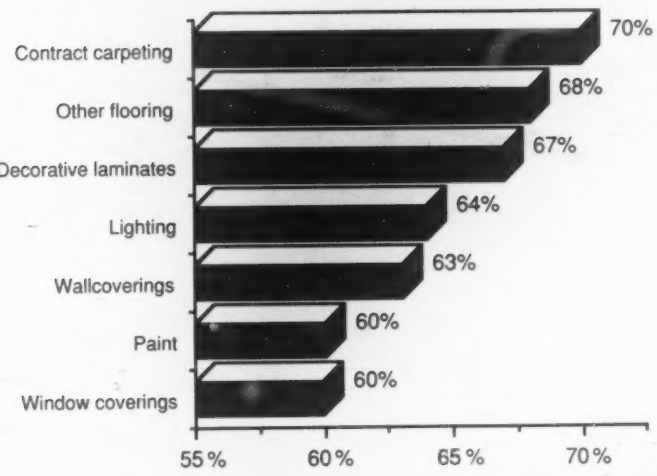
What major trends do these designers see? This experienced group, uniquely qualified as observers of the profession, were asked which changes taking place over the last five years most affected their work. Out of nine trends studied, four were seen as having major impact: the increasing use of office automation (55 percent); the growing acceptance of open plan office space (53 percent); the increase of renovation and "retrofit" projects over those in new construction (51 percent); and the planning of larger or more luxurious kitchens and/or hospitality centers (49 percent).

New Work vs. Renovation

Considering more specifically the trend towards renovation projects, we asked what the actual figures currently are. Of contract installations, 57 percent, measured in dollar volume, are renovations; of residential work, the figure is 58 percent.

Use of Dealers

We were also curious about the role of dealers today in the profession. Almost all designers (97 percent), our survey showed, use dealers or distributors for at least some products. They were most likely to use them when selecting products in the following areas:

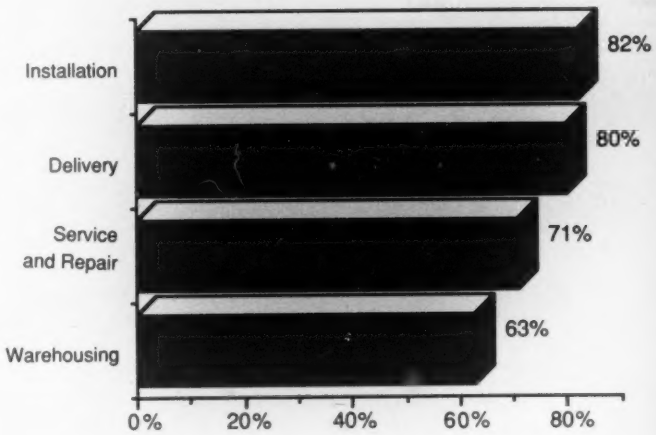


Products purchased through dealers

Designers as Dealers

A related question asked the designers to what extent they think their firms have begun to provide services that traditionally were offered by dealers or distributors. (For this question, we excluded designers working for dealers.) Almost one in five designers (22 percent) say their firms have asssumed functions associated with dealers "to a great extent," and another one in three (35 percent), say their firms have done so "to some extent." The largest firms, the survey showed, are the least likely to offer such services.

The dealer services now most frequently performed by designers are:



Dealer services performed by designers

However, the firms insist that, when ordering office furniture through a dealer, it is still the design firm—not the dealer—that specifies the brand or manufacturer.

Other Questions

Interior Design commisioned the Yankelovich study as a service for the profession and believes that the results published above are of interest to many readers. We asked other questions that were geared specifically to our own publication policies and that will benefit the profession less directly, through magazine pages more closely focused on reader needs and concerns. Just one detail from these more personal matters: the highest percentage, 65 percent of the surveyed designers, prefer to look for information in a magazine that presents both residential and contract work, thus reinforcing our own convictions here at *Interior Design*.

STANLEY ABERCROMBIE, FAIA